

**2004 Budget
State of the Community Report**



Business Survey Results

Prepared for:

Corporate Strategy & Policy Analysis
Section
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The City of Greater Sudbury

By:

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Objective

- The following represents the results of a public opinion survey conducted for The City of Greater Sudbury. The objective of this survey was to gauge the opinions of business owners, managers and professionals from the municipality on a series of issues related to life in the community and about services.

Methodology and Statistics

Project Team

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- Paul Seccaspina PhD, Oraclepoll Research Ltd.
- Bob Sinclair PhD, Oraclepoll Research Ltd.

Methodology and Statistics

Study Sample

- A total of 100 businesses from the City of Greater Sudbury were interviewed in the survey.
- The study sample was randomly selected from an active database of businesses and professionals in the City.
- Interviewers screened for one of the following respondents: principal owner, President; VP Marketing; VP Manufacturing or VP Technology. Interviews were conducted in December 2003.

Survey Method

- The survey was conducted using computer-assisted techniques of telephone interviewing (CATI) and random number selection.
- Interviews were conducted in English or in French, as the respondent preferred.
- A total of 30% of all interviews were monitored and the management of Oraclepoll Research supervised 100%.

Logistics

- Interviews were conducted in December 2003.
- Calls were made from 8:30 a.m. to 6:00 p.m. with call-backs of no-answers and busy numbers made on a (staggered) daily rotating basis up to 5 times until contact was made. In addition, telephone interview appointments were attempted with those respondents unable to complete the survey at the time of contact.

Confidence

- The margin of error for a survey of this nature is +/- 9.8%, 19/20 times.

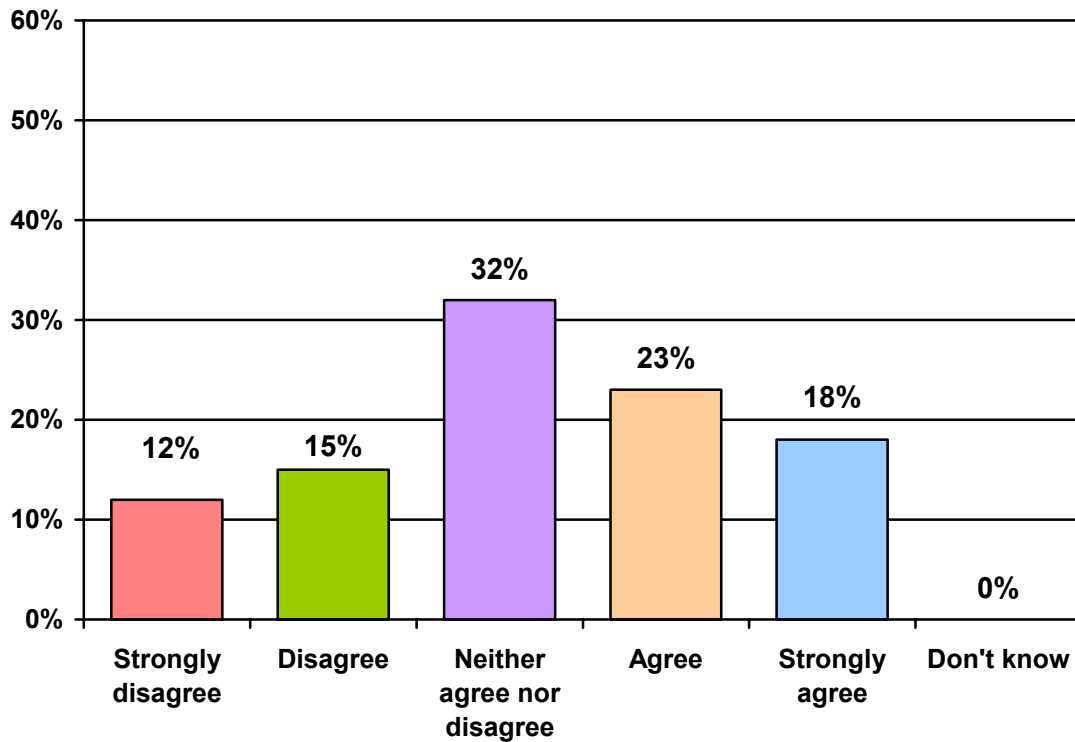
Executive Summary

Our Community's Future

Confidence Areas

Respondents were asked to agree or disagree with the following statement.

"I am confident about the economic future of the community?"



Among businesses surveyed, 41% agreed or strongly agreed that they were confident about the economic future of the community, an improvement over the 27% that stated the same in the previous survey period.

In addition, 39% were of the opinion that the City is **changing for the better**, 21% for the worse, while 37% stated that there was no change and 3% did not know. In the last survey period, 39% of businesses were of the opinion that the community is changing for the better, while 38% were of the opinion there was no change, and a total of 21% claimed that things were worse.

Most important issues facing the community

Respondents were asked from the perspective of their business, what they felt was the **most important issue** facing the community.

Most Important Top of Mind Issues

2001		2002		2003		2004	
Taxes (high)	25%	Taxes (high)	21%	Roads	14%	Taxes	17%
Jobs / Unemployment	13%	Economic diversification	14%	Jobs / Unemployment	14%	Roads	15%
Economic diversification	10%	Business friendly environment	12%	Taxes	12%	Health care	6%
Business friendly environment	8%	Jobs / Unemployment	11%	Economic diversification	12%	Job creation	5%
Restructuring (process)	7%	Service accessibility	10%	By-laws	12%	Amalgamation	4%
Service accessibility	5%	By-laws	7%	Population decline	5%	Economy	3%

(Excluding responses of Don't Know)

The issue of taxes, which has been a top three concern over the past four survey periods is the most cited issue among area businesses, followed by roads and health care.

Municipal Services

Importance of services

Respondents were asked to rate the importance of a range of services that the municipality currently provides. The following table ranks each category by level of importance to respondents.

Importance of Services	2001 Priority	2002 Priority	2003 Priority	2004 Priority	2003/2004 Change +/-%
Winter road maintenance	85%	89%	94%	92%	-2%
Fire protection	69%	81%	92%	92%	0%
Ambulance services	77%	83%	90%	90%	0%
Maintenance of main roads	83%	93%	91%	88%	-3%
Planning for the City's future	74%	70%	90%	87%	-3%
Economic diversification	79%	76%	85%	86%	1%
Water & sewer services	79%	71%	82%	84%	2%
Policing	76%	75%	90%	83%	-7%
Developing job creation initiatives	74%	83%	79%	83%	4%
Promoting tourism	66%	80%	79%	79%	0%
Public health unit services	67%	73%	81%	78%	-3%
Ensuring building safety	64%	64%	72%	76%	4%
Promoting the reduction of waste	64%	72%	76%	70%	-6%
Pioneer Manor	58%	71%	73%	67%	-6%
Landfill sites	57%	67%	69%	69%	0%
Recreational facilities	47%	59%	53%	68%	15%
Public transit	56%	59%	65%	65%	0%
Re-greening of the City	56%	74%	63%	63%	0%
Libraries	58%	72%	61%	59%	-2%
Providing affordable housing	43%	53%	59%	57%	-2%
Leisure programs	42%	49%	45%	57%	12%
Child care funding	41%	52%	56%	51%	-5%
Providing quality of land development	49%	52%	58%	44%	-14%
Providing welfare assistance	28%	24%	40%	43%	3%

Most priority ratings remained consistent, while ensuring quality of land development decreased in important, but recreational facilities and leisure programs increased.

Rating services

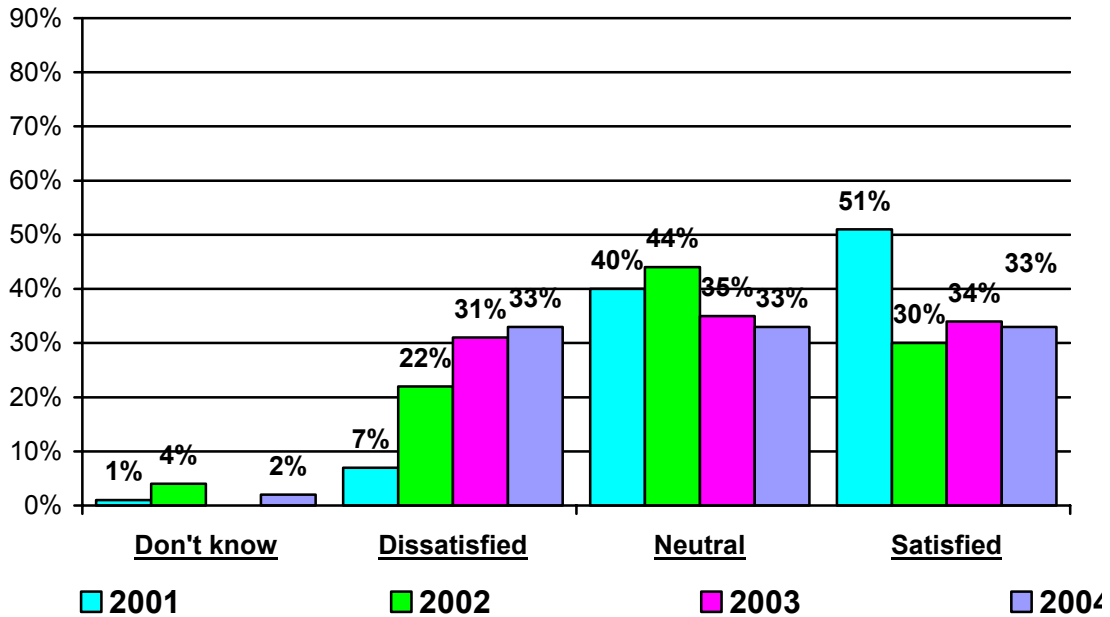
Respondents were then asked to rate how the community currently provides a range of services. The following table highlights the positive ratings accorded to each service in order of highest rated.

Rating Services	2001 Positive	2002 Positive	2003 Positive	2004 Positive	2003/2004 Change +/-%
Recreational facilities	45%	53%	49%	37%	-12%
Libraries	41%	64%	66%	55%	-11%
Economic diversification	26%	20%	30%	20%	-10%
Leisure programs	33%	37%	39%	30%	-9%
Public transit	32%	49%	57%	51%	-6%
Providing quality of land development	16%	14%	21%	16%	-5%
Policing	58%	51%	59%	56%	-3%
Maintenance of main roads	26%	21%	18%	17%	-1%
Promoting the reduction of waste	37%	49%	49%	49%	0%
Providing affordable housing	26%	28%	25%	25%	0%
Planning for the City's future	40%	35%	34%	35%	1%
Re-greening of the City	52%	39%	55%	58%	3%
Landfill sites	27%	41%	33%	36%	3%
Providing welfare assistance	21%	28%	27%	31%	4%
Child care funding	7%	16%	13%	18%	5%
Promoting tourism	44%	30%	46%	52%	6%
Winter road maintenance	38%	37%	32%	38%	6%
Developing job creation initiatives	17%	14%	16%	23%	7%
Ambulance services	48%	63%	63%	72%	9%
Public health unit services	44%	59%	55%	64%	9%
Ensuring building safety	30%	45%	33%	43%	10%
Pioneer Manor	30%	35%	45%	56%	11%
Water and sewer services	32%	31%	35%	46%	11%
Fire protection	62%	74%	55%	72%	17%

There were good rating increases for such areas as ambulance service, fire and ensuring building safety. Areas where ratings dropped over 2002 included, libraries, recreational facilities and leisure programs.

Satisfaction with the Range of Services Provided by the City

Businesses were asked to rate the **range** of services provided by the City of Greater Sudbury.



Results are consistent over the previous survey period.

B u d g e t I s s u e s

Budget Issues

Businesses were read and asked to agree or disagree with each of the following **budget** related statements that have been tracked.

TRACKING ITEMS	Total Agree			
	2001	2002	2003	2004
Rather than building new facilities or roads, the City should invest in maintaining and improving existing facilities and roads	76%	69%	78%	69%
Where appropriate the direct users of City services should pay for the cost of providing those services	48%	49%	47%	38%
The City should reduce service levels by whatever is needed in order to hold the line on taxes	31%	26%	22%	24%
The City should maintain current levels of service and increase taxes up to 5%	32%	28%	30%	44%

While there was more buy-in with respect to accepting a 5% tax increase to maintain services, there was less related to user fees and maintenance of facilities rather than building new ones.

Respondents were also asked to agree or disagree with each of the following new **budget** related statements.

NEW ITEMS	Total Agree
The City should pursue innovative means in order to deliver municipal services and to operate it's facilities	63%
I would be willing pay more taxes in order to improve infrastructure such as roads and to reopen facilities	39%
I would support a specific tax levy to support road maintenance (e.g., 3% of my property taxes paid above the level of my current property taxes).	34%
The City should borrow money to pay for needed infrastructure and maintenance	27%
Store hours should be allowed to set their own hours of operation without the city regulating them	60%

There was majority agreement only with respect to storeowners regulating their own hours and that the City should pursue innovative ways to deliver services.